

Julia Lynch: Age in the Welfare State: The Origins of Social Spending on Pensioners, Workers and Children

Yehoshou, Haya

Veröffentlichungsversion / Published Version

Rezension / review

Empfohlene Zitierung / Suggested Citation:

Yehoshou, H. (2008). Julia Lynch: Age in the Welfare State: The Origins of Social Spending on Pensioners, Workers and Children. *Sociologický časopis / Czech Sociological Review*, 44(3), 607-609. <https://nbn-resolving.org/urn:nbn:de:0168-ssoar-59032>

Nutzungsbedingungen:

Dieser Text wird unter einer Deposit-Lizenz (Keine Weiterverbreitung - keine Bearbeitung) zur Verfügung gestellt. Gewährt wird ein nicht exklusives, nicht übertragbares, persönliches und beschränktes Recht auf Nutzung dieses Dokuments. Dieses Dokument ist ausschließlich für den persönlichen, nicht-kommerziellen Gebrauch bestimmt. Auf sämtlichen Kopien dieses Dokuments müssen alle Urheberrechtshinweise und sonstigen Hinweise auf gesetzlichen Schutz beibehalten werden. Sie dürfen dieses Dokument nicht in irgendeiner Weise abändern, noch dürfen Sie dieses Dokument für öffentliche oder kommerzielle Zwecke vervielfältigen, öffentlich ausstellen, aufführen, vertreiben oder anderweitig nutzen.

Mit der Verwendung dieses Dokuments erkennen Sie die Nutzungsbedingungen an.

Terms of use:

This document is made available under Deposit Licence (No Redistribution - no modifications). We grant a non-exclusive, non-transferable, individual and limited right to using this document. This document is solely intended for your personal, non-commercial use. All of the copies of this documents must retain all copyright information and other information regarding legal protection. You are not allowed to alter this document in any way, to copy it for public or commercial purposes, to exhibit the document in public, to perform, distribute or otherwise use the document in public.

By using this particular document, you accept the above-stated conditions of use.

as his methodological frame. Even though Freedman's 'liberal' conceptualisation of ideology remains very useful, there is no question Hanley has largely achieved his goal of illustrating the logic and emergence of the 'ideological compound' that ODS produced. Indeed, this post-Marxist approach appears very suitable for reconstructing the ideology of the party's 'revolutionary conservatism'. Perhaps the most valuable contribution of the entire monograph lies in the ways in which it disentangles the notion of the 'civic' politics of the Czech right and identifies the political concepts it contains and 'de-contests'. Hanley is perfectly aware how another post-communist right-wing party, Hungary's Fidesz, managed to offer a strong political identity to a noteworthy segment of the electorate built upon the party's own definition of 'civic' politics. Finally, the author provides a smart though not always fully convincing explanation of why and under which circumstances ODS radically – by the standards of the moderate right – redressed its 'civic' version of transition politics to one based on defending the national interest. This chapter will certainly be fascinating for those who are not Czech nationals and are not familiar in detail with the topic, but it may be surprising and elucidating for most domestic readers, too. In spite of the many claim to the contrary, it shows that ideologies have played an important role in post-communist transitions.

All in all, Seán Hanley's treatment of the political ideology of the Czech right constitutes this book's greatest achievement. Ideology and its changes are presented here as a factor enabling us to understand the interconnection between the pragmatism of party-political competition and the more or less sincere effort to politically articulate the 'concealed assumptions in our political controversies' – in the Czech way.

Peter Učeň
Comenius University, Bratislava

Julia Lynch: *Age in the Welfare State: The Origins of Social Spending on Pensioners, Workers and Children*
New York, NY, 2006: Cambridge University Press, 223 pp.

Welfare states, in allocating resources, to different age groups, affect various aspects of the citizens' wellbeing and life chances, from educational opportunities to labour and financial markets, family formation and family structure, fertility, and so forth. Moreover, different welfare states affect younger and older populations differently. While some countries focus on potential risks during childhood and working life, education, child care, the family, housing and active labour market policy, other countries highlight the needs of the elderly, by means of generous pension benefits and medical care. Prioritised social spending may thus generate inequalities among age groups. Julia Lynch's *Age in the Welfare State* sheds much-needed light on this phenomenon, dubbed the age orientation of welfare states. Lynch examines how social policies in prosperous OECD democracies deal with the risks facing the elderly, the young, and working adults; what is done in different countries towards different age groups in the populations; the reasons why policies vary from country to country and over time, and the political consequences of different strategies for redistributing resources across different age groups in society.

Lynch examines direct expenditures, tax expenditures and housing policy in twenty OECD countries, on average, between 1985 and 2000, and thus draws conclusions on the age orientation of social policy. Direct expenditures include 'income supports and services for the elderly; unemployment and active labor market policies; public spending on occupational injury and sickness programs; public spending on cash benefits and services for family per person under 15; public

education spending per person aged 0–20, and health spending ratios per capita'. *Total expenditures* in each category are adjusted to the size of the beneficiary pool and expressed as a percentage of the nation's per capita gross domestic product (GDP). Lynch's summary measure captures public social insurance expenditures on elderly age groups (aged 65+ or retired) versus non-elderly age groups (aged 0–65 and not in formal retirement), in the Elderly/Non-elderly Spending Ratio – an estimate of the relative weight of spending on these populations. Lynch concludes that countries vary, and vary consistently, in the emphasis they place on elderly versus non-elderly populations in public policies. Scandinavian and British Commonwealth countries turn out to hold the most youth-oriented social spending policies, while the most elderly-oriented countries are a diverse group that includes parts of continental Europe (Italy, Greece, Spain, and Austria), the United States, and Japan.

Chapter Three of the book then reviews a variety of potential classic explanations as for why the age orientation in contemporary social policies varies among countries. Lynch discusses changes due to the modernisation and the growth of what she terms 'grey power': large groups of elderly voters, interested in pension programs. However, she maintains that such explanations are not sufficient in accounting for a country's age orientation in social policy. Other explanations based in the realm of family structures, religious orientation, and power resources similarly provide weak explanations for the 'age' of contemporary welfare. Lynch mentions, for instance, that Catholic-dominated welfare states differ remarkably in their treatment of different age groups. Instead, Lynch argues that the path-dependent evolution of political and social policy institutions provides a better explanation for the age orientation of welfare state spending. Lynch divides the OECD welfare state according to

two features: institutional design – occupational versus citizenship-based welfare regimes – and programmatic versus particularistic political competition modes. Lynch argues that the institutional design according to which countries organised their social programmes and modes of electoral competition between politicians are the two key historical factors in determining today's age orientation of social spending.

Lynch indicates two critical junctures in this regard. First, in the very early 20th century, welfare states emerged based either on citizenship or on occupation. Citizenship-based programmes become more youth-oriented with time, while occupationalist programmes later gave rise to more elderly-oriented social spending. At the second critical juncture, shortly after the Second World War, the occupationalist set of welfare states further divided into two groups: one which maintained occupationally based family allowance and unemployment programmes, and one which replaced many of its pre-war occupationalist programmes with new citizenship-based ones. These welfare state designs were reinforced, according to Lynch, by the predominant mode of political-electoral competition in these countries, being either programmatic (according to general policy programmes), or particularistic (tailored to specific beneficiary groups). This explains why occupational programmes persisted in some countries but not in others – and in turn why the age orientation of some countries' programmes changed considerably over the course of the century. At the start of the 20th century, citizenship-based regimes turned to labour market outsiders – people with weak ties to unions, such as children, abandoned mothers, or the poor – by offering them state protection. In contrast, occupational regimes protected labour market insiders – people with long term, stable employment, core industrial workers between jobs, retired workers, and people with job-related health problems.

The second juncture occurred when countries took different paths; some stayed on the occupationalist track, and some made a change, adopting citizenship-based welfare programs. The latter shared programmatic modes of electoral-political competition, while the former shared a particularistic mode of competition.

Chapters Four through Six contain interesting case studies showing the development of, respectively, family allowance, unemployment and old age pension benefits in Italy and the Netherlands since the early 1900s. Lynch chose Italy and the Netherlands since both countries had occupational welfare states prior to the Second World War, but followed different trajectories in terms of their age orientation in the post-war period. Occupationalist Italy persistently continued its distinctly elderly-oriented social policy orientation supported by clientelistic political competition, whereas the Netherlands grew to have more youth-oriented policies. The Dutch welfare state today is characterised by universal citizenship-based benefits, quite generous for children and working age adults, and a moderate public pension spending system. Youth-oriented citizenship-based programmes here grew on a base of neutral state capacities, provided by programmatic political competition. However, it should be pointed out that countries need not necessarily oper-

ate according to a pure model of policy. A country can pursue the policy of a citizenship-based welfare regime, but still benefit special groups in the population, or pursue a policy of an occupational welfare regime, but still have welfare programmes that benefit the entire population. Another important factor is that countries may also shift according to more short-term dynamic politics, changing from election to election. The inner politics of a country many factors affect the changes occurring in it, and therefore policy, plans and the orientation towards groups will surely go through numerous variations during short periods of time. Nevertheless, *Age in the Welfare State* provides a welcome historical-institutional addition to more quantitatively oriented sociological studies of the role of population ageing and political institutions in contemporary OECD welfare states.¹ In sum, Julia Lynch has without a doubt made an important contribution to the politics and sociology of social policy.

Haya Yehoshou
University of Haifa

Notes:

¹ For a recent study, see, for instance, Markus Tepe and Pieter Vanhuyse, 'Are Mature Welfare States on the Path to the Politics of Gerontocracy? Evidence from 18 OECD Democracies, 1980–2002' (Berlin and Haifa: unpublished paper, 2008, available: at www.SSRN.com).